

APS Government Affairs (GA) focuses on federal policy issues, engaging with policymakers and staff in Congress, at the White House and throughout the Executive Branch Agencies; APS GA does not engage on local-level issues (state, city, institution, etc). That said, many of the techniques APS GA staff employ for direct advocacy at the federal level can also be used by individuals interested in engaging on local/state/institution policy issues. APS GA is happy to provide resources that APS members and staff can use to effectively advocate at any level.

The following worksheet provides an informational step-by-step guide that anyone can use to develop an effective advocacy plan for a policy issue they want to take action on, including identifying relevant actors and allies. Advocacy activities that members and staff undertake using this worksheet may fall outside the scope of APS’s policy positions and activities.

Personal Advocacy Issue Worksheet

The steps below will help you more fully develop your advocacy idea, identify allies, and outline a plan of action. Our goal is to help you generate and organize materials that will make your advocacy more effective. This list was developed based on the experiences, practices and expertise of government affairs professionals.

The steps are divided into six sections:

1. Issue description
2. Background research
3. Issue description (second iteration)
4. Communication strategy
5. Work with allies
6. Potential next steps

1. Issue Description

The first step in developing your advocacy activity is to be able to articulate in a clear and concise manner the challenge and actions required to address it, as well as identifying the relevant audience for that message. This section guides you through the process of distilling your idea down to a short description of what your issue is, what some actions to address it could be, and what groups are relevant stakeholders. In the description, it’s essential to use language that someone who is not familiar with the issue can understand.

Issue Description		
Item	Description	Outcome
Policy of Interest	What is the policy you care about/interested in changing	Short description of the policy
Keywords	What are up to five keywords related to your advocacy idea? For example: K-12 Education, Higher-Ed, Teacher Preparation, Equity,	A list of ≤5 topical areas

	Institutional Climate, Tax Allocations, Climate Change.	related to the issue
Concern	Summarize in three to five sentences what concern is to be addressed. You may include background information.	A short description of the issue
Stakeholders	Who are the groups that are affected by the issue? Keep these groups as local/specific as possible (avoiding things like “the country” or “scientists”) For example: high-school graduates from schools in the state, constituents of district ##, small business, etc.	A list of groups that are affected by the issue
Decision Makers	Who are the people and groups of people that have influence over the issue? For example: state legislators, a university board of regents, a county council, a school board, etc.	A list of people or groups of people that have influence over the issue
Potential Actions	What are some actions that can be taken to address the concern identified?	A list of actions
Relationships	This is a KEY step . For each potential action identified in the previous step write down the decision makers that could take that action and with concerned groups would be impacted.	Links between the lists previously generated

2. Background Research

Surrounding the concern you wish to solve, there are always unique political realities to contend with when advocating. This section guides you through researching and organizing the information of the “policy space” specific to your local issue.

Background Research		
Item	Description	Outcome
Inherent timelines	Research timelines that constrain potential decision makers. For example, certain state legislatures only meet for certain months of the year, or university regents only have a few meetings each year.	A calendar that will help you plan when you can make the most impact
Potential Allies and Opposition	Research organizations and people among the stakeholders that could be allies and roadblocks your efforts. This list could include groups as diverse as unions, scientific societies, departments at local universities, PTAs, and others.	A list of potential allies and opponents
Your Representatives	Your representatives, at different levels of government but also within your institution’s governance structure, can be your allies, even	A list of your representatives

	if they do not have direct oversight over the issue. Identify your city, county and state representatives. If it is relevant, identify the office for government relations of your institutions. If the issue you are taking on is internal to your institution, identify representatives with the governance committees of the institution, such as regents, faculty representatives, chairs and deans.	at various levels of government
How does the issue relate to your representative priorities?	Use the list of topics you generated for step one of this worksheet and find overlap with the priorities and concerns of your representatives, looking at their websites and statements.	Links between yours and your elected officials' priorities

3. Issue Description Revision

Once you understand the issue at hand and the political realities of your locality, you might find the need to revise your issue description. This step encourages you to do so.

Issue Description (second iteration)		
Item	Description	Outcome
Issue Description Round 2	Revise and edit the steps of the first iteration of the issue description, incorporating information learned through background research	A revised description of the issue

4. Communication Strategy

With knowledge and prepared materials about your issue and your locality, the next step towards achieving advocacy success is sharing that knowledge and materials with the appropriate audiences. This section will guide you through the basics of preparing a strategy for that communication.

Communication Strategy		
Item	Description	Outcome
Summarizing key background information (the motivation and the issue)	Summarize the reason a solution is needed in the first place, including an overview of the issue that requires solving, in a paragraph (less than 200 words)	A summary of the motivation for your solution, and the issue it solves
Summarizing the action you are requesting be taken	Summarize the particular solution to your issue that you have formulated in previous steps in a paragraph (less than 200 words)	A summary of your proposed solution
Identify and collect personal stories	Storytelling is a very effective in communicating a message.	A collection of stories that will best represent

	<p>First, start with brainstorming your own stories on how this issue affects you and the ones you know.</p> <p>Second, contact people from allied groups and ask them to share a story about how the issue impacts them.</p> <p><u>Stories are the most effective way to communicate the human-scale impact of an issue.</u></p> <p>Select the most compelling two to three stories and summarize them in a paragraph each.</p>	<p>the real impact of the issue you want to solve</p>
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5. Working with Allies

Building a coalition and working with different organizations and people enables you to influence more decision makers, utilize resources and expertise you might not have, and provide benefits to those working towards similar goals. This section explains how to contact and work alongside those groups.

Working with Allies		
Item	Description	Outcome
Reach out to your identified allies	Send an email (or phone call if appropriate) to potential allies with an invitation to collaborate. Be mindful that people might have more expertise and might have worked for years in this space. Use a respectful tone in your communications. You can consider sharing the materials you developed during step 4 and solicit their thoughts.	

Once steps 1-5 are completed, you will be in discussion with allies on how to best message the issue and solutions, and you will have a list of decision makers and the actions they could take to address the issue that you are concerned about.

6. Potential Next Steps

From here, potential next steps could include coordinating with allies (and learning from them) to contact decision makers with 1-2-page summaries of the requested action, the motivation, the issue and one to three stories of the impact that the issue is having on people. We want to emphasize the importance of short, clear documents that start with the requested action, then summarize the anchoring content. Decision makers and their staff have to process extremely large amounts of information, and they will be very appreciative of succinct, compelling and to-the-point materials.

We have also shared a document with tips on how to conduct an effective meeting with Congressional offices, which contains great tips for having an effective meeting with decision makers at all levels.